

Committee Management Use Case Specification: View Meeting Roster Report

Version 1.6

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REVISION HISTORY

Date	Version	Description of Change	Author
4/24/02	1.0	Initial Version	C Blizzard
4/25/02	1.1	Added Screen Image	C Blizzard
4/26/02	1.2	Moved Acronym and City, State, Zip Algorithms to Common Use Case Components Document	C Blizzard
4/30/02	1.3	Added sample report layout, modified person address section, moved person address to common use case components. Add report cover and end sheet requirements. Added updated parameter screen image.	C Blizzard
5/1/02	1.4	Updated parameter form screen shot. Modified the data spec parameter section to include the report title.	C Blizzard
5/2/02	1.5	Updated based on Carl's comment. Updated flow of events with new report stereotype.	C Blizzard
6/20/02	1.6	Updated use case based on comments from the CDR	K Collie

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1. Brief Description

The Meeting Roster Report use case specification describes the meeting roster report and how to generate it. This use case goes beyond simple requirements for the following reasons:

1. The system is a migration effort from Oracle Forms and as a result the underlying physical design will be used to the fullest extent possible.
2. The user has come to accept many GUI characteristics of the existing system.

User's will be able to enter parameters to select a specific meeting then enter parameters to output several variations of the meeting roster report.

2. Pre-Conditions

Use Case Specification: Logon to Committee Management.

3. Flow of Events

3.1 Activity Diagram



3.2 Textual Flow

1. <<Report>> Stereotype. See Meeting Roster Parameters and Meeting Roster Repeating Parameters.

3.3 Alternative Flows

None.

4. Data Specifications

4.1 Meeting Roster Parameters Elements

The parameters below select a specific meeting. User's will enter parameters to define a specific meeting.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Report Title	The title of the report. Allows the user to edit the title.	Char(50)	Required. Defaults to 'Meeting Roster'.	N/A
	N/A			
Acronym	A pick list of committee acronyms.	Char(6)	Required.	N/A
	Cmtes_t.nih_abbr_code			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Flex	A pick list of flex codes for the acronym selected in the acronym pick list.	Char(1)	Required.	N/A
	Cmtes_t.flex_code			
SRA Org	Indicates the branch or section holding the meeting.	Char(6)	Optional. Required for SEPs.	N/A
	Cmte_fed_staffs_t.meeting_org_acronym_code (foreign key meeting_agendas_t.fed_staff_num)			
SRA Flex	Indicates the SRA responsible for the meeting.	Char(1)	Optional. Required for SEPs.	N/A
	Cmte_fed_staffs_t.fed_staff_init_text (foreign key meeting_agendas_t.fed_staff_num)			
Meeting Start Date	Start date of a meeting. This is a pick list that lists all meetings for the federal staff person selected in the federal staff person pick list.	Date	Required.	N/A
	Meeting_agendas_t.start_date			
Agenda_seq_num	Unique meeting identifier. Derived from the selection the meeting start date.		Not visible.	N/A
	Meeting_agendas_t.agenda_seq_num			

4.2 Meeting Roster Repeating Parameter Elements

User's will be able to enter more than one set of parameters for the following repeating elements. The system will generate one roster report for the meeting selected in the Meeting Roster Parameter Elements for each parameter grouping entered below. For example, a user can enter a ROS address type and a MLG address type and get two rosters for the same meeting. One roster will show the ROS addresses for the attendees and the other roster will show the MLG address types for the attendees.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Address Type	A pick list of address types.	Char(3)	Required. Default to 'ROS'.	N/A
	Addr_types_t.addr_type_code. See Common Use Case Components, Data Validation, Address Types.			
Include Phone/Fax/E-Mail	Indicates whether the phone, fax and e-mail should be output on the report.	Char(1)	Required. 'Y' or 'N'. Default to 'N'	N/A
	N/A			
Force Upper Case	Indicates if the roster should be output in all upper case characters.	Char(1)	Required. 'Y' or 'N'. Default to 'Y'	N/A
	N/A			
Print 1 or 2 Columns	Indicates if the roster should be output in one or two columns.	Char(1)	Required. '1' or '2'. Default to '2'	N/A
	N/A			
Print Cover and End Sheets	Indicates whether to include the report cover and end sheets.	Char(1)	Required; 'Y' or 'N', default 'N'.	N/A
	N/A. See the Common Components Use Case, Other Requirements, Print Cover and End Sheets			

4.3 Meeting Roster Cover and End Sheets

See Common Use Case Components, Data Specifications, Report Cover and End Sheets.

4.4 Meeting Roster Header Elements

The Meeting Roster Header Elements will print on every page of the roster.

Element name	Description	Formatting	Edits	Data Conversion
Table/Column Name				
'Meeting Roster'	Outputs the words 'Meeting Roster' as the title of the report.	Dependent on 'Force Upper Case' Parameter.	Centered. Line 1 of the header.	N/A
	N/A			
Committee Title	Outputs the committee title as part of the report heading.	Dependent on 'Force Upper Case' Parameter.	Centered. Line 2 of the header.	N/A
	Cmtes_t.cmt_title			
Parent Committee Title	Outputs the committee title of the parent committee, if applicable.	Dependent on 'Force Upper Case' Parameter.	Centered. Line 3 of the header, if applicable. If it doesn't exist, this line is collapsed.	N/A
	Cmtes_t.cmt_title. See the Common Use Case Components Use Case, Algorithms, Subcommittee Identification.			
Agency	Outputs the agency name.	Dependent on 'Force Upper Case' Parameter.	Centered. Outputs on the line after the parent committee title, if applicable, or the committee title if no parent committee title exists.	N/A
	Phs_orgs_t.phs_org_name			

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Acronym	Outputs the complete acronym.	Dependent on 'Force Upper Case' Parameter.	Centered. Outputs on the line after the Agency. The acronym is concatenated with the flex code, sra designator, sra flex and group code. See Algorithms, Formatting the Acronym.	N/A
	See Common Use Case Components, Algorithms, Acronym.			
Panel Name	Outputs the panel name as part of the header.	Dependent on 'Force Upper Case' Parameter.	Centered. Outputs on the line after the acronym, if a panel name is entered.	N/A
	Meeting_agendas_t.panel_name			
Meeting Start Date	Outputs the meeting start date as part of the report header.	Dependent on 'Force Upper Case' Parameter.	Centered. The meeting start date and meeting end date are concatenated. See Algorithms, Formatting the Meeting Date. Outputs on the line after the panel name, if it exists. If there is no panel name, outputs on the line after the acronym.	N/A
	Meeting_agendas_t.meeting_start_date			
Meeting End Date	Outputs the meeting end date as part of the report header.	Dependent on 'Force Upper Case' Parameter.	See Meeting Start Date above.	N/A
	Meeting_agendas_t.meeting_end_date			

4.5 Meeting Roster Body Elements

The Meeting Roster Body Elements describe the name and address information that is output on the report.

4.5.1 Person Name

The person's name and title can be found in the `mrst_prsn` view.

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Name	The name of the meeting attendee.	Char(150). Dependent on 'Force Upper Case' Parameter.	Left justified. The name and degree information is concatenated. See Algorithms, Formatting the Attendee's Name.	N/A
	Mrst_prsn.last_name, Mrst_prsn.first_name, Mrst_prsn.mi_name			
Title	Outputs the title of the attendee.	Char(240). Dependent on 'Force Upper Case' Parameter.	Left Justified. Outputs on line after the name. Line is collapsed if no title exists.	N/A
	Mrst_prsn.title			

4.5.2 Person Address

The person's address can be found in the `person_addresses_t` table, using the `person_id` as the foreign key to the `mrst_prsn` view.

See Common Use Case Components, Data Specifications, Person Address Data Elements.

4.6 Meeting Roster Footnote Elements

Footnotes are printed one time, after the body is complete. The footnote(s) will appear at the end of the last column of attendees. The footnote will fit within the column.

Element name	Description	Formatting	Edits	Data Conversion
Table/Column Name				
Temporary Member Footnote	Display footnote for IRG committees that have at least one temporary member on the roster. A temporary member is a member with an attendee_type_code = '05' and a member_type_code <> '13'.	Char(250)	Left justified. If a temporary member is on the roster, this footnote will appear first.	N/A
* Temporary Member. For grant applications, temporary members may participate in the entire meeting or may review only selected applications as needed.'				
Temporary Member Senior Reviewer Footnote	Display footnote for RG IRG committees that have at least one temporary member senior reviewer on the roster. A temporary member is a member with an attendee_type_code = '05' and a member_type_code = '13'.	Char(250)	Left justified. If a temporary member, Senior Reviewer is on the roster, it will appear after the temporary member footnote, if applicable.	N/A
*** Temporary Member-Senior Reviewer. For grant applications, temporary member-senior reviewers may participate in the entire meeting or may review only selected applications as needed.'				
Consultants Footnote	Display for all IRG committees.	Char(250)	Left justified. The consultants footnote will appear last, if applicable.	N/A
'Consultants are required to absent themselves from the room during the review of any application if their presence would constitute or appear to constitute a conflict of interest.'				

4.7 Meeting Roster Footer Elements

Footer Elements are printed at the bottom of each page.

Element name	Description	Formatting	Edits	Data Conversion
Table/Column Name				
'CM6065'	Displays the report ID.	Char(6)	Left Justified.	N/A
N/A				

Element name	Description	Formatting	Edits	Data Conversion
	Table/Column Name			
Page Number	Outputs the label 'Page: ' followed by the page number.	Char(9)	Right Justified on the same line as the report ID.	N/A
	N/A			
Date	Outputs the date the report was generated.	Date. MM/DD/YYYY format.	Right Justified on the line below the Page Number.	N/A
	N/A			

5. Post-Conditions

The Meeting Roster Report has been generated.

6. Special Requirements

6.1 Data Validation

6.2 Algorithms

6.2.1 Formatting Meeting Date

If the meeting start date and meeting end date are the same date, display the date in 'Month DD, YYYY' format. If the meeting start date and end date are different dates, display the date in 'Month DD, YYYY – Month DD, YYYY' format with the first date being the start date and the second date being the end date.

6.2.2 Formatting the Attendee's Name

See Common Components Use Case, Name Formatting and Common Components Use Case, Degree Formatting. Once the name with degrees is formatted, the following rules apply:

1. If the attendee_role_code is a '05' and the member_type_code is a '13' append '**' after the name. This person is a Temporary Member/Senior Reviewer. A footnote will appear on the report.
2. If the attendee_role_code is a '05' and the member_type_code is not a '13' append '*' after the name. This person is a Temporary Member. A footnote will appear on the report.

6.3 Requirements

6.3.1 Sorting the Report

The report should be sorted by the Attendee Role Codes then by last_name, first_name, mi_name.

The attendee role codes should be sorted in the following order:

Sort Order	Attendee Role Code	Attendee Role Descriptions
1	02	Chairperson
2	03	Acting Chair
3	01, 05, 06, 04	Regular, Temporary, Flexible, SEP
4	18	Ad Hoc
5	19	Mail Reviewer
6	07	Executive Secretary
7	08	Scientific Review Administrator
8	09	Designated Federal Official
9	10	Grants Technical Assistant
10	11	Program Representative
11	12	Contract Representative
12	13	Grants Management Representative
13	14	Observer
14	15	Other Review Staff
15	16	Ex Officio
16	17	Other

6.3.2 Attendee Role Headings

Some attendee roles require that a heading appear before any attendees with that role are listed on the roster. The text below describes the conditions for displaying the attendee role headings.

1. If the attendee role codes are '01', '04', '05', '06', do not display a heading.
2. If the attendee role code is 19 display 'Mail Reviewer(s)' as the heading.
3. If any other attendee role code, display the attendee role description.

The heading should appear only one time in a grouping. For example, if there are five mail reviewers on a roster, the heading 'Mail Reviewer(s)' would appear first, then the five mail reviewers would be listed. The heading is NOT repeated for each attendee.

6.3.3 Editing the Report

Users will have the ability to edit the report once it has been generated.

6.4 Other Requirements

None.

6.5.1 Meeting Roster Parameter Form

6.5.2 Sample Report

Since the Meeting Roster is an existing report in CM, a sample report is attached to assist with properly laying out this report.

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